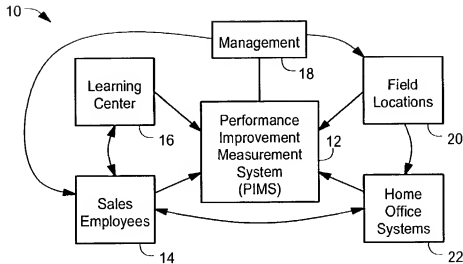
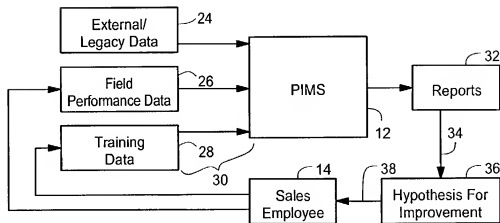


1/23

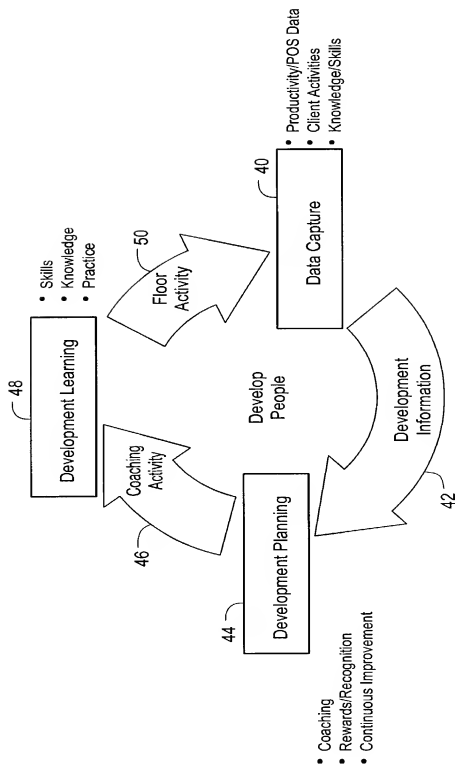


**FIG. 1**



**FIG. 2**

2/23



**FIG. 3**

3/23

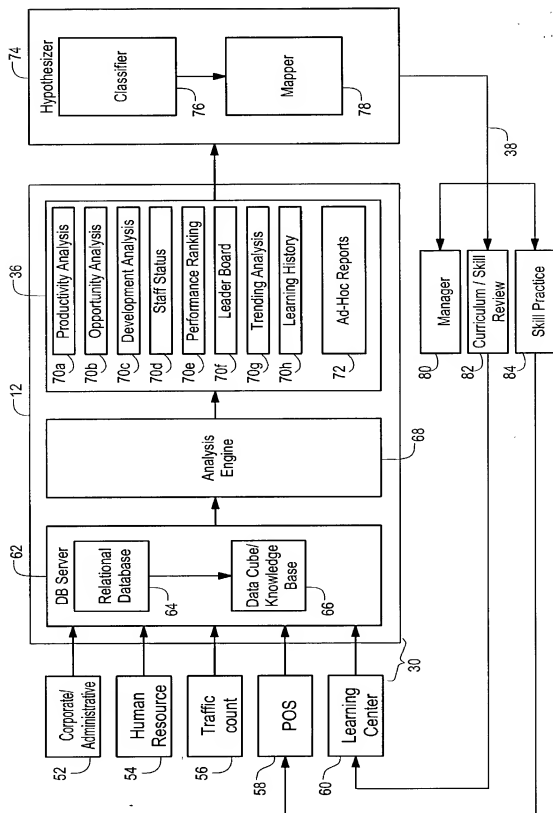
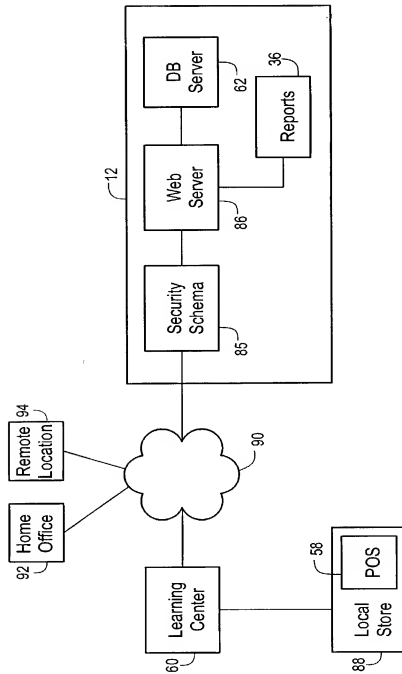


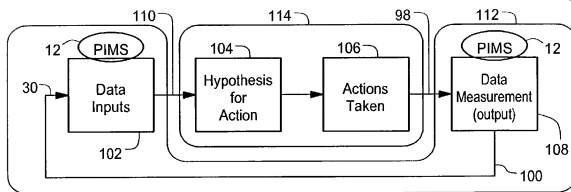
FIG. 4

4/23

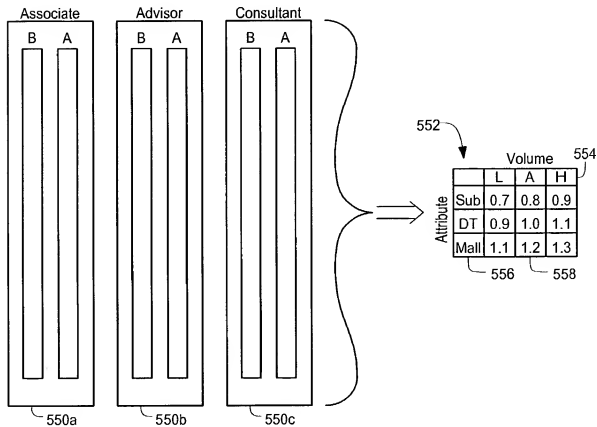


**FIG. 5**

5/23

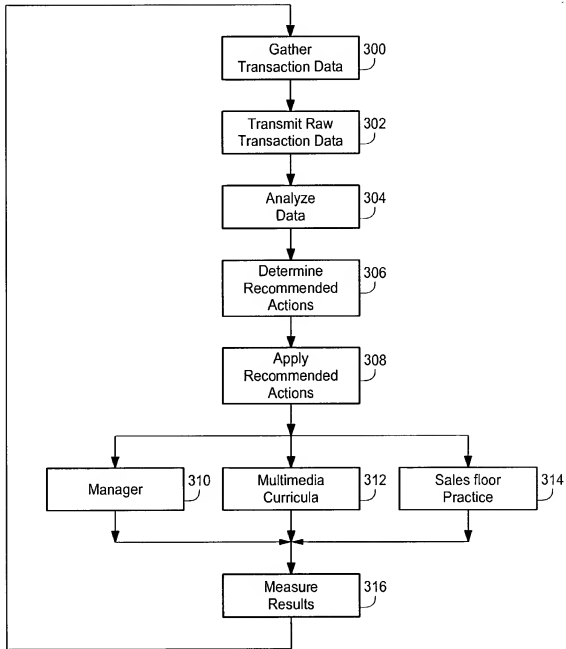


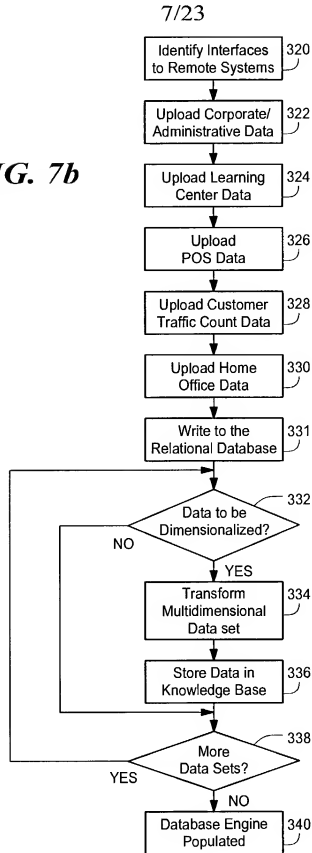
**FIG. 6**



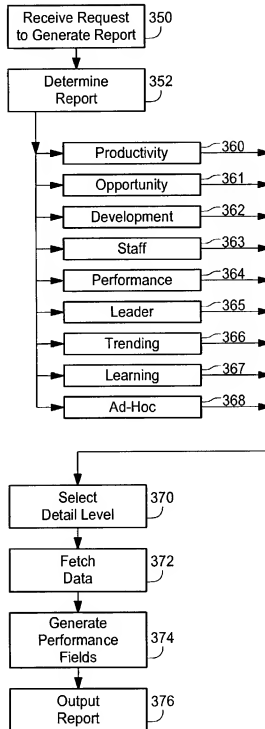
**FIG. 10**

6/23

**FIG. 7a**

**FIG. 7b**

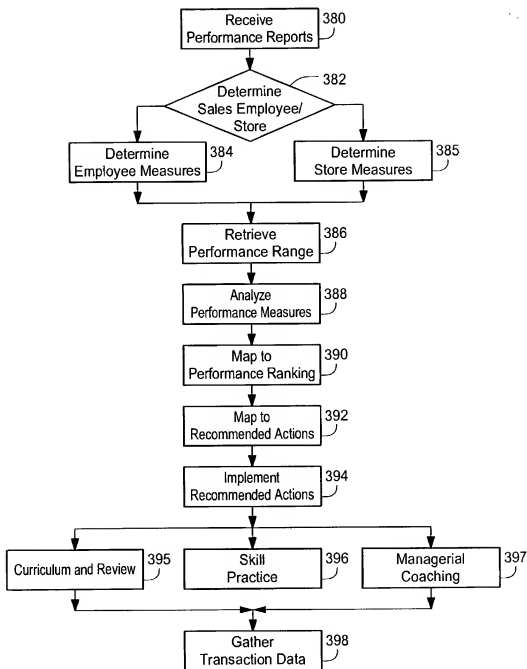
8/23



**FIG. 7c**



9/23



**FIG. 7d**

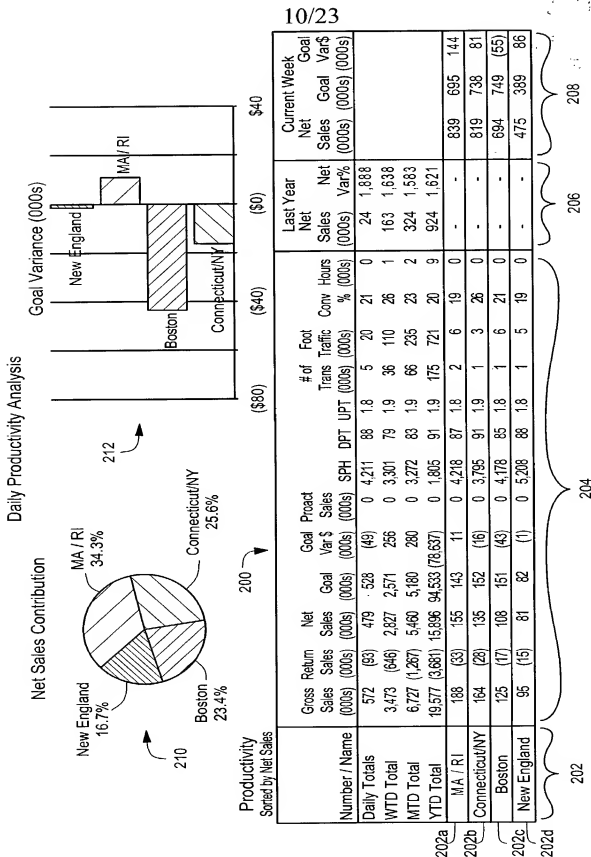
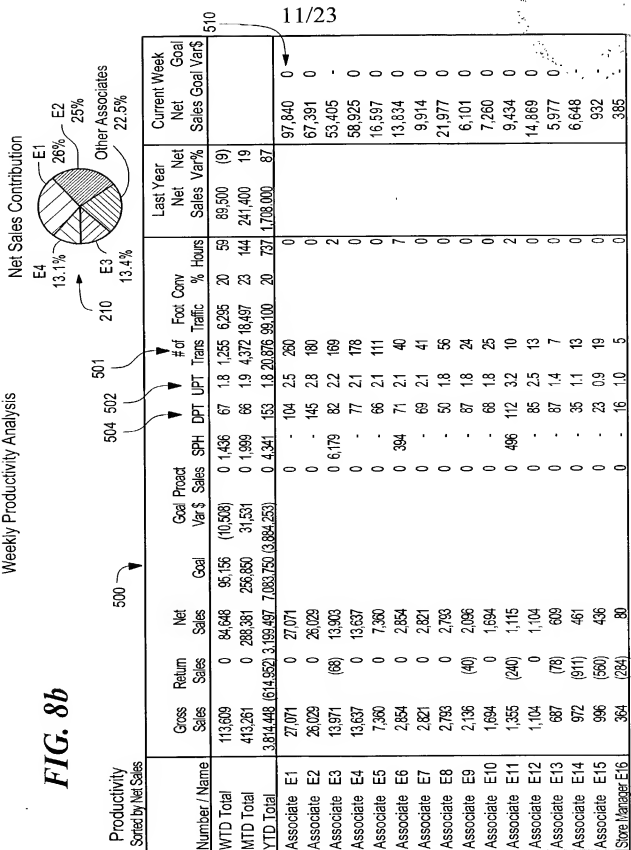


FIG. 8a

Weekly Productivity Analysis

FIG. 8b





13/23

## Weekly Opportunity Analysis

218'

214' -

## Transaction Analysis

Totals By Hour

Totals		9-10	10-11	11-12	12-1	1-2	2-3	3-4	4-5	5-6	6-7	7-8	8-9	9-10	Hours
Associates on Duty Transactions	1,255	6	6	6	0	0	0	1	1	1	1	1	1	1	3
Non-transactions	5,040	0	25	88	141	162	177	180	142	129	79	73	40	19	0
Foot Traffic	6,295	63	213	390	435	622	615	675	563	451	385	284	175	108	60
Conv %	20	63	238	476	576	784	792	855	705	580	464	357	215	127	60
		0	11	18	24	21	22	21	20	22	17	20	19	15	0
Sales Transactions By Hour															
Number / Name Description	# of Trans	9-10	10-11	11-12	12-1	1-2	2-3	3-4	4-5	5-6	6-7	7-8	8-9	9-10	Other
E3 Associate	4	-	1	1	0	0	1	0	1	-	-	-	-	-	0
E4 Associate	4 178	-	-	11	18	14	29	41	22	20	10	5	4	4	0
E5 Associate	13	-	-	-	-	-	-	-	-	-	-	-	4	6	3
E6 Store Manager	0	-	0	0	0	0	0	0	0	0	0	0	0	0	-
E7 Associate	2 180	-	11	23	20	30	29	23	24	19	1	-	-	-	0
E2 Associate	10	0	0	0	2	7	0	1	0	-	-	-	-	-	0
E1 Associate	1 260	-	9	28	32	43	35	19	21	28	24	17	4	-	0

**FIG. 8d**

2021

Associate E1

Development Analysis

202

14/23

220

Productivity Summary

	Gross Sales	Return Sales	Net Sales	Goal	Goal Var \$	Proactive Sales	SPH	DPT	UPT	TPH	# of Trans	Hrs
MTD Total	110,058	(246)	109,812	-	-	0	-	150	2.5	324	730	2
YTD Total	265,451	(2,366)	263,084	-	-	0	-	146	2.4	800	1,800	2

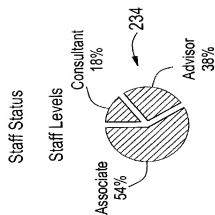
224

226

228

222

FIG. 8e



Number / Name	Tenure (Years)	Associates (Advisors in Training)			Advisors (Consultants in Training)			Consultants	Total
		Advanced	Verified	Certified	Advanced	Verified	Certified		
0005 Connecticut / NY	2.7	100			40			23	163
0006 Boston	2.2	100			50			29	179
0024 MA / RI	2.8	90			60			41	191
0042 New England	2.1	60			30			26	116
Total	2.5	350			180			119	649

**FIG. 8f**

16/23

Performance Ranking

240

Number / Name	Gross Sales (000s)	Return Sales (000s)	Net Sales (000s)	Goal Var \$ (000s)	LY Net Sales (000s)	Proact Sales (000s)	% Total Sales	SPH	DPT	UPT	# of Trans (000s)	Foot Traffic (000s)	Conv %	Hours % (000s)
Connecticut / NY	3,326	(729)	2,597	2,711	(114)	-	0	2,817	83	1.9	31	73	29	1
MA / RI	3,318	(767)	2,551	2,510	40	-	0	3,353	78	1.8	33	156	18	1
Boston	2,852	(569)	2,283	2,798	(515)	600	0	2,033	81	1.9	28	127	21	1
New England	1,795	(344)	1,451	1,327	123	-	0	1,769	83	1.9	17	81	20	1

236

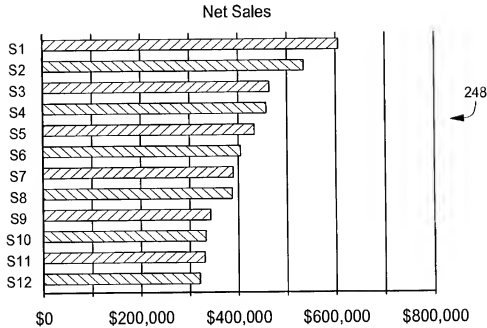
238

FIG. 8g



17/23

Leader Board



242

Rank	Store	Net Sales
1	S1	606,931
2	S2	531,718
3	S3	461,874
4	S4	459,173
5	S5	432,294
6	S6	405,657
7	S7	391,964
8	S8	388,885
9	S9	344,313
10	S10	332,095
11	S11	331,600
12	S12	319,592

244

246

**FIG. 8h**

18/23

Monthly Trending Analysis

250

Productivity

Number / Name	2001 Period 10		2001 Period 9		2001 Period 8		2001 Period 7		2001 Period 6		2001 Period 5	
	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal
Total												
Net Sales	8,881,717	9,346,925	27,470	9,802,627	0	12,077,400	-	6,378,590	-	6,792,985	-	10,244,393
SPH	2,450	-	10	-	0	-	-	-	-	-	-	-
DPT	81	-	96	-	-	-	-	-	-	-	-	-
UPT	1.9	-	2.2	-	-	-	-	-	-	-	-	-
TPH	30	-	0	-	-	-	-	-	-	-	-	-
Conv %	23	-	1	-	-	-	-	-	-	-	-	-
Connecticut / NY												
Net Sales	2,596,960	2,711,111	0	2,763,975	0	3,418,083	-	1,695,117	-	1,963,114	-	2,958,411
SPH	2,817	-	0	-	0	-	-	-	-	-	-	-
DPT	83	-	-	-	-	-	-	-	-	-	-	-
UPT	1.9	-	-	-	-	-	-	-	-	-	-	-
TPH	34	-	-	-	-	-	-	-	-	-	-	-
Conv %	30	-	0	-	0	-	-	-	-	-	-	-
Boston												
Net Sales	2,283,313	2,798,237	22,098	3,280,156	0	3,985,581	-	2,156,003	-	2,072,636	-	3,271,754
SPH	2,033	-	38	-	0	-	-	-	-	-	-	-
DPT	81	-	103	-	-	-	-	-	-	-	-	-
UPT	1.9	-	2.3	-	-	-	-	-	-	-	-	-
TPH	25	-	0	-	-	-	-	-	-	-	-	-
Conv %	22	-	1	-	-	-	-	-	-	-	-	-
MA / RI												
Net Sales	2,550,825	2,510,361	78	2,500,513	0	3,118,615	-	1,589,860	-	1,706,599	-	2,652,819
SPH	3,353	-	0	-	0	-	-	-	-	-	-	-
DPT	78	-	78	-	-	-	-	-	-	-	-	-
UPT	1.8	-	1.0	-	-	-	-	-	-	-	-	-
TPH	43	-	0	-	-	-	-	-	-	-	-	-
Conv %	21	-	-	-	-	-	-	-	-	-	-	-
New England												
Net Sales	1,450,619	1,327,216	5,294	9,346,925	0	1,555,191	-	937,610	-	1,050,636	-	1,361,409
SPH	1,769	-	8	-	0	-	-	-	-	-	-	-
DPT	83	-	77	-	-	-	-	-	-	-	-	-
UPT	1.9	-	2.0	-	-	-	-	-	-	-	-	-
TPH	21	-	0	-	-	-	-	-	-	-	-	-
Conv %	22	-	1	-	-	-	-	-	-	-	-	-

252

254

FIG. 8i

19/23

Associate E1

Learning History

257

256

Curriculum Description	Sequence Description	Course Description	Test Score	Start Date	Computer Date	Last Access Date	Course Time
Client Relationship	Associate Level	Associate Level Evaluation	100	05/16/2001	05/21/2001	05/21/2001	1.5
Client Relationship	Advisor Level	Advisor Level Evaluation	100	07/16/2001	07/23/2001	07/23/2001	1.5
Client Relationship	Consultant Level	Consultant Level Evaluation	100	09/16/2001	09/25/2001	09/25/2001	1.5

264

262

260

258

FIG. 8j

20/23

Associate

# Trans	UPT	DPT	Action(s)
L	L	L	1 + 2 + 3
L	L	A	1 + 2
L	L	H	1 + 2
L	A	L	1 + 2
L	A	A	1 + 2
L	A	H	Congratulate on good job with the clients you work with 1 + 2
L	H	L	1 + 2
L	H	A	1 + 2
L	H	H	Congratulate on good job with the clients you work with 1 + 2
A	L	L	3
A	L	A	3
A	L	H	3
A	A	L	3
A	A	A	Congratulate on good job 3
A	A	H	Congratulate on good job 3
A	H	L	3
A	H	A	Congratulate on good job 3
A	H	H	Congratulate on good job 3
H	L	L	3
H	L	A	3
H	L	H	3
H	A	L	3
H	A	A	Congratulate on great job 3
H	A	H	Congratulate on great job 3
H	H	L	Congratulate on great job
H	H	A	Promotion Candidate
H	H	H	Promotion Candidate

L = Low, A = Average, H = High

1 = Preparing Yourself 2 = Engaging Client 3 = Sharing Information

**FIG. 9a**

21/23

Advisor

UPT	# Trans	DPT	Action(s)
L	L	L	1 + 2
L	L	A	1 + 2
L	L	H	1 + 2
L	A	L	1 + 2
L	A	A	1 + 2
L	A	H	1 + 2
L	H	L	1 + 2
L	H	A	1 + 2
L	H	H	1 + 2
A	L	L	3 + 2
A	L	A	3 + 2
A	L	H	3 + 2
A	A	L	3 + 2
A	A	A	Congratulate on good job 3
A	A	H	Congratulate on good job 3
A	H	L	2
A	H	A	Congratulate on good job
A	H	H	Congratulate on good job
H	L	L	3
H	L	A	3
H	L	H	3
H	A	L	Congratulate on great job
H	A	A	Congratulate on great job Possible Promotion for Candidate
H	A	H	Congratulate on great job Possible Promotion for Candidate
H	H	L	Promotion Candidate
H	H	A	Promotion Candidate
H	H	H	Promotion Candidate

L = Low, A = Average, H = High

1 = Understanding Needs 2 = Creating Solutions 3 = Balancing Experiences

FIG. 9b

22/23

524

Consultant	# Phone Contacts	# Apts	# Clients	Action(s)
	L	L	L	1 + 2
	L	L	A	1 + 2
	L	L	H	1 + 2
	L	A	L	1
	L	A	A	1
	L	A	H	2 + 1
	L	H	L	1
	L	H	A	Congratulate on working well proactively with client; find out why low phone contact
	L	H	H	Congratulate on working well proactively with client; find out why low phone contact
	A	L	L	2 + 1
	A	L	A	2
	A	L	H	2
	A	A	L	2 + 1
	A	A	A	2
	A	A	H	2
	A	H	L	2 + 1
	A	H	A	2
	A	H	H	2
	A	H	H	Congratulate on good job
	H	L	L	2 + 1
	H	L	A	2
	H	L	H	2
	H	A	L	2 + 1
	H	A	A	2
	H	A	H	2
	H	A	H	Key player to leverage & possibly promote
	H	A	H	2
	H	A	H	Key player to leverage & possibly promote
	H	H	L	Key player to leverage and promote and find out why low clients
	H	H	L	1
	H	H	A	Key player to leverage and promote
	H	H	H	Key player to leverage and promote

L = Low, A = Average, H = High

1 = Offering Services 2 = Delighting Clients 3 = Driving Business

526

**FIG. 9c**

23/23

Level:

Store

Usage of DCE Tools	Sales Associate Issues	Team Composition	Action(s)
N	L	L	Congratulate on good job 3
N	L	A	Congratulate on great job
N	L	H	Congratulate on good job 3
N	A	L	3
N	A	A	No action - watch for improvement
N	A	H	3
N	H	L	2 + 3
N	H	A	2
N	H	H	2 + 3
Y	L	L	1 + 3
Y	L	A	1
Y	L	H	1 + 3
Y	A	L	1 + 3
Y	A	A	1
Y	A	H	1 + 3
Y	H	L	SM needs immediate help. 1 + 2 + 3
Y	H	A	SM needs immediate help. 1 + 2
Y	H	H	SM needs immediate help. 1 + 2 + 3

N = No, Y = Yes

L = Low/Under staffed, A = Average/Appropriately staffed, H = High/Over staffed

530	1 = Phone SM and schedule store visit to discuss learning tools
	2 = Plan store visit and coach SM to prepare individual development plan
	3 = Plan quarterly/semi-annual store visit to review personnel strategy and development plan

**FIG. 9d**